

# EXHIBIT F



# **A Proposal to T-Scan for Alfresco Liferay Portal Implementation**

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## Table of Contents

1.0 Introduction .....	3
1.1 Project Goals & Objectives .....	3
1.2 Project Scope .....	3
1.2.1 Architecture and Design .....	3
1.2.2 The source for the scope understanding is: .....	4
1.2.3 Specific exclusions .....	4
2.0 Recommended Solution .....	5
2.1 Products, Tools and Technologies .....	5
2.2 Technical View of Proposed Solution .....	5
2.2.1 Solution Diagram: .....	6
2.2.2 Software application stack that will form part of the solution: .....	7
3.0 Functional View .....	8
3.1 User Module .....	8
3.1.1 User Registration Process .....	8
3.1.2 Sharing Document or inviting user to an external community. ....	9
3.2 Kofax Alfresco Acordex Portal Integration .....	11
3.2.1 CIFS .....	11
3.2.2 Alfresco Content Model .....	11
3.2.3 Alfresco Meta-data Synchronization. ....	11
3.2.4 Acordex Integration .....	11
3.3 Liferay-Alfresco Integration Module .....	11
3.3.1 Create Order (T-Scan XLS Figure 9) .....	12
3.3.2 Adding Recipients to Order/Request (T-Scan XLS Figure) .....	17
3.3.3 Request Creation (T-Scan XLS Figure) .....	20
3.3.4 <i>Standard Request (T-Scan XLS Figure)</i> .....	23
3.3.5 <i>Subpoena Request (T-Scan XLS Figure)</i> .....	23
3.3.5.1 Request Summary View .....	26
3.3.5.2 Order Summary View .....	27
3.3.6 Call History .....	28
3.3.7 QC .....	35
3.4 Corporate Overview Module .....	44
3.5 Services Module .....	44
3.6 News/Events Module .....	44
3.7 Management Module .....	44
3.8 Contact Us Module .....	44
4.0 Provision for Future Roadmap .....	45
4.1 Court Reporting Services .....	45
4.2 Referral Network .....	45
4.3 News/Events .....	45
5.0 Timelines/Schedule .....	46
5.1 Activities and Deliverables .....	46
6.0 Assumptions .....	49
6.1 Technical Assumption .....	49
6.2 Resource Assumption .....	49
6.3 General Assumptions .....	49
7.0 Project Price and Payment Terms .....	50
1. Resource, Project Duration & Price .....	50
7.1 Project Expenses .....	50
Appendix A: Acceptance and Sign Off .....	51



## 1.0 Introduction

### 1.1 Project Goals & Objectives

T-Scan Corporation is a privately operated, full service litigation support company headquartered in Seattle, Washington. T-Scan Corporation is dedicated to remain at the forefront of technology, offering the latest in record retrieval methods, document production, and electronic discovery to its customers.

T-Scan intends to leverage the functionality of their existing Cold-Fusion Application into Alfresco by building a Web Application and develop a hosted document repository with Alfresco as the technology backbone through which T-Scan can deliver documents out to its clients. T-Scan's objective is to provide an effective business process outsourcing service that simplifies the labor and technology intensive task of record retrieval.

T-Scan intends to redesign its web site, [tscanonline.com](http://tscanonline.com). The objectives of the project are as follows:

- Propose a usable interface for customers to interact with T-Scan.
- Remove the dependency on Cold-Fusion intranet application.
- Allow T-Scan employees to create and follow-up orders and tasks.
- Provide a simpler user interface for specialists of T-Scan.
- Propose a more product-centric Website design.
- Provide a better search functionality to the specialists in-order to search for Orders, Patients, Providers, Cases etc.,
- Provide a centralized repository to store the documents.

### 1.2 Project Scope

BPA's understanding of the scope of this project includes the following activities based on the high level requirements from T-Scan:

#### 1.2.1 Architecture and Design

- a. **Activities:** Propose new architecture and design to implement [Tscanonline.com](http://Tscanonline.com) using the following product stack.
  - Alfresco 3.0 Enterprise for Content Management
  - Liferay Portal 5.1.2 for user interface
  - Customize the Liferay Portal to replace Cold-Fusion application functionality.
  - A custom Alfresco data model to replace Cold-Fusion application database schema.
  - Design a database in MySQL 5.1/MS SQL Server 2005.
  - Lucene for indexing and searching documents and meta-data stored in Alfresco.
  - Customize the Liferay Portal to build [Tscanonline.com](http://Tscanonline.com) website.
  - Analyze requirements & design, develop, test and deploy the Alfresco based application for T-Scan
  - Develop a Web Application that allows the specialists (T-Scan employees and clients) to create orders and track the calls, request, received and QA tasks of the records.
  - Develop Role based user access
  - Allow for sharing of documents within the case community
  - Develop/integrate a PDF Document viewer that does not allow any saving or caching of images or documents in custom folders
  - Integration of Kofax Scanner with Alfresco that allows the scanned documents to be created in specific folders and subfolders of the directory structure, with corresponding meta-data.



b. **Deliverables:** A high level architecture/design document will be designed. The document will outline logical and physical architecture, choice of tools, technologies and products. The high level design will identify different types of use cases, and for each use case, outline process flow, components, data sources and user interface.

c. **Roles & Responsibilities:** BPA will produce the architecture and design document.

- Analyze requirements & design, develop, test and deploy the Alfresco based application for T-Scan
- Develop a Web Application that allows the specialists (T-Scan employees) to create orders and track the request, received and QA tasks of the records.
- Develop Role based user access
- Allow for sharing of documents within the case community
- Develop/integrate a PDF Document viewer that does not allow any saving or caching of images or documents in custom folders
- Integration of Kofax Scanner with Alfresco that allows the scanned documents to be created in specific folders and subfolders of the directory structure, with corresponding meta-data.
- Migration of current Provider and Client Database (To include current electronic user names and passwords) into the new database.

#### 1.2.2 The source for the scope understanding is:

- An Excel Spreadsheet and Images provided by Tscan which is referred to by figure numbers throughout this document
- Conference call and discussion with T-Scan team involved in this initiative
- Rally Scrum as a methodology for the reporting and tracking of the backlog and iterations (The Backlog will be created and both Parties will agree upon the Iterations as part of acceptance of the proposal and before development begins. T-Scan will provide feedback to BPA's Iterations and will provide bug fixes based on the schedule of deliverables and a testing method which is agreed upon by BPA and T-Scan.

#### 1.2.3 Specific exclusions

The following activities and artifacts are specifically excluded from BPA's current project scope.

1. Integration of Kofax for Bates Numbering.
2. Integration of the Court Reporting Services.
3. Integration of the Referral Network Services.





## **2.0 Recommended Solution**

### **2.1 Products, Tools and Technologies**

The scope of this engagement is the design of TSCANONLINE.COM.

At a high level, the website involves the following:

1. Liferay Portal Integration with Alfresco Repository
2. Static Content on all the links viz., Corporate Overview, Management, Contact Us within the Liferay Portal
3. Building custom portlets in Liferay.
4. A web application for replacing the existing cold-fusion application that will be built into the Alfresco Web Client.

The key objectives of the design effort are to replace the existing T-Scan's Cold-Fusion Application and build a web application within Liferay Portal and provide the above functionalities within the Tscan portal.

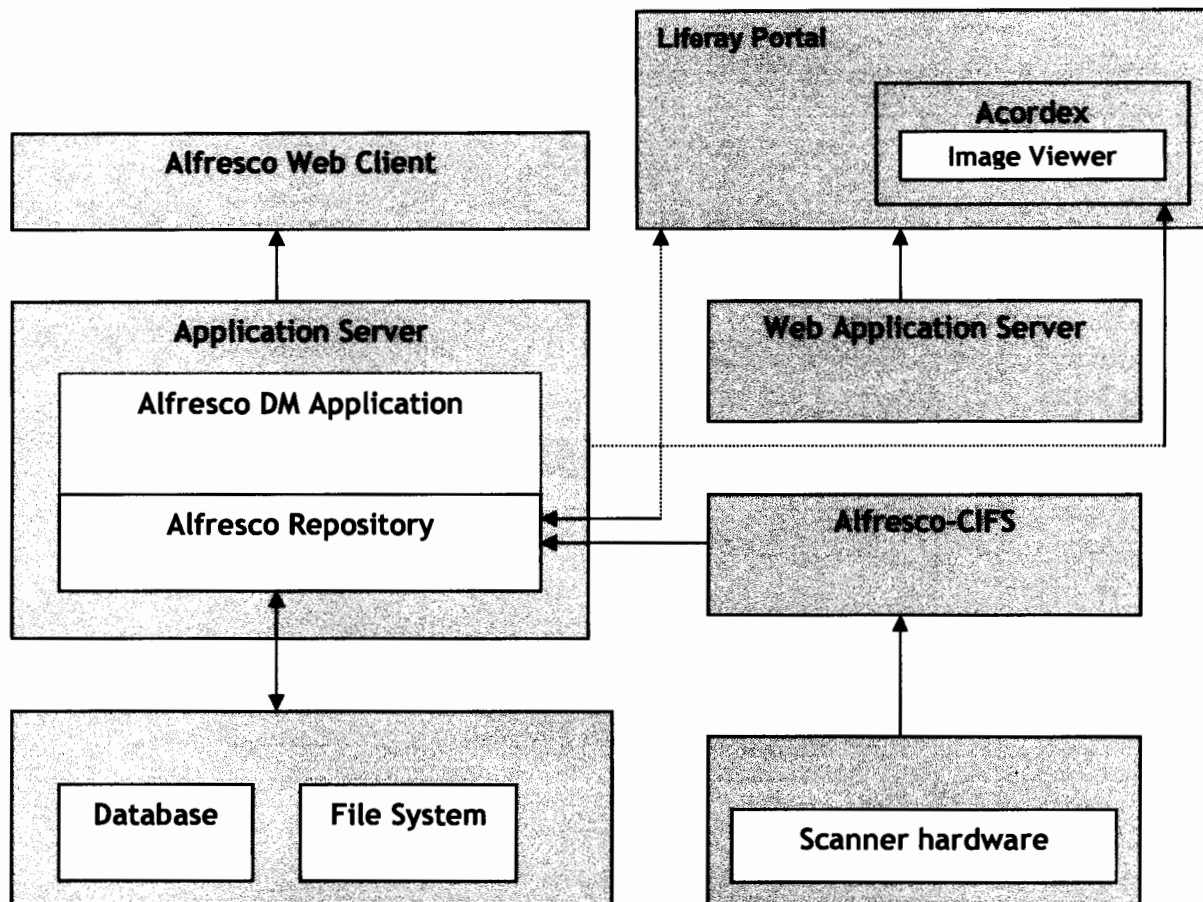
T-Scan has also chosen Alfresco Enterprise as the strategic content management platform and wants to leverage it wherever appropriate.

### **2.2 Technical View of Proposed Solution**

The following diagram illustrates the logical breakdown of the various services, and systems in the proposed architecture. Please note that the diagram represents neither the logical nor the physical architecture. It is only meant to allow readers to visualize the various components that are in scope of the engagement. The logical, physical and deployment model of the solution will be addressed in the design document.



### 2.2.1 Solution Diagram:





### 2.2.2 Software application stack that will form part of the solution:

Component	Product
Portal	Liferay 5.1.2
Content Management System	Alfresco Enterprise 3.0
Database	MySQL 5.x
Document Viewer	Acordex ViewTIFF for Java
Imaging and Scanning	Kofax Ascent Capture 7x
Alfresco Kofax plug-in	Alfresco-CIFS
Application Server	Apache Tomcat 5.5
Platform	Java J2EE





## 3.0 Functional View

This section provides a functional view of the proposed solution. The portal is functionally broken down in to the following modules:

### 3.1 User Module

The user module provides portal user's account management functionality that allows T-Scan users and employees to register, and access portal/website information and services. The module implements and supports registration, user profiles, and authentication and role based access control.

The information relevant to users/accounts can be categorized into the following:

- User Registration, and User profile information
- Different types of User Roles viz.,
  - ✓ User
  - ✓ Power User
  - ✓ Administrator
  - ✓ Consumer
- User access to custom portlets such as orders, tasks, records etc based on the above user roles.

#### 3.1.1 User Registration Process

##### Entry Points

SRS-1	The user's entry point to TScan's Portal will be by accessing the URL, <a href="https://www.tscanonline.com">https://www.tscanonline.com</a> .
SRS-2	The user can simply browse the website as a normal user, if the user wishes to browse without login.

law firms liability	static page
insurance carriers	static page
class action/product liability	static page
production services	static page
records processing	static page
our process	new graphic page
Careers	hr page
registration splash	links to registration form
document services splash	links to documents services
research and referral splash	links to benchpress
introductory flash splash	go green type advertisement
about us	static page
Services	static page
our team	static page w/bios



Mission	static page
Faq	static page
contact us	static page
rss feed	rss portlet with legal news
corporate feed	t-scan newsletter
Login	login to client/t-scan portal
Submit/reset	submits or resets login



#### Scenarios

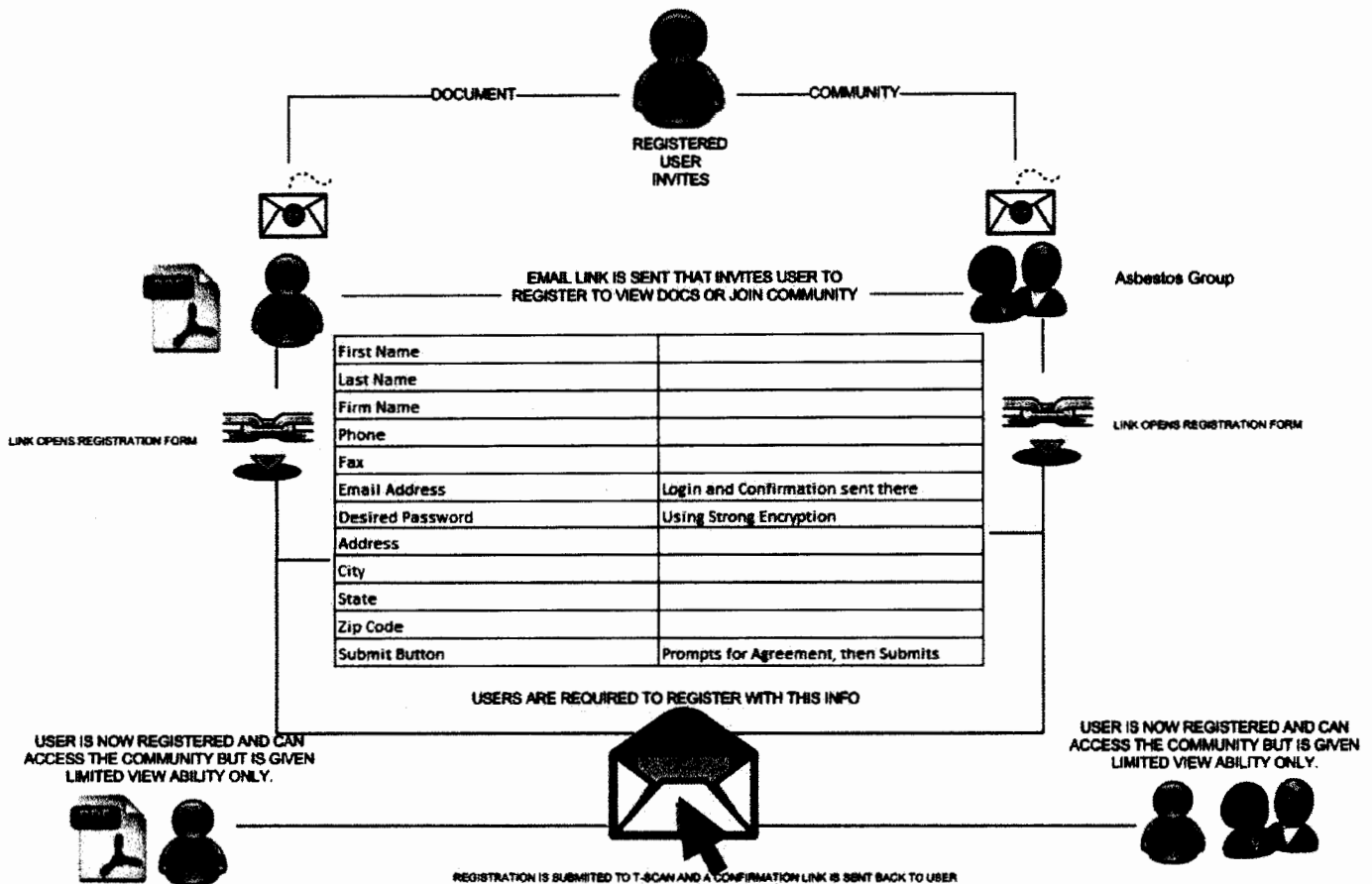
SRS-1	The user will login or register link.
SRS-2	Login credentials can be entered on any page (upper right corner). User enters User name and Password and clicks "Submit" for logging in. Clicking "Reset" button clears entered user credentials.
SRS-3	If the user clicks on the register link, then the user's registration UI will be opened.
SRS-4	The user will fill out the registration form and click on "Submit" button.
SRS-5	The user's registration information is received by TScan's Manager who will review the information and will either approve or reject the user's registration process on line.
SRS-6	If the user's registration is approved, then the user will receive an email from Tscan with the user id and password and a link to the appropriate
SRS-7	The user can use this information to login.
SRS-8	T-Scan Employees will login in a similar methodology from the web URL

#### 3.1.2 Sharing Document or inviting user to an external community.

Please refer to the diagram below.



## T-Scan Invitation Registration



SRS-9	Registered user can invite an external user to see a document or be part of his community. In this case the registered user will search for public user profiles and select one of the public user profiles or enter the email and name of the person (if there is no public user profile) and send in invite.
SRS-10	An email from TScan server is sent to the user who has been invited.
SRS-11	Email contains a link, clicking the link will send the user to a user registration page (where server realizes that a particular user has acknowledged the email).
SRS-12	User enters his details and submits. Server checks the data user has entered and automatically sends in an email once all the details entered by the user are satisfactory.
SRS-13	When user clicks the link (second email) sent, user is redirected to login page and upon login user's authorization is set to view document (which was shared to him) or be a part of the community where he was invited.



## 3.2 Kofax Alfresco Acordex Portal Integration

### 3.2.1 CIFS

The scanned records received documents that will be released from Kofax will be stored in the Alfresco's watch folder, using the CIFS Network Share Drive.

### 3.2.2 Alfresco Content Model

1. There will be three custom types in Alfresco:
  - a. Order Folder(Custom Content Type for Order Folder)
  - b. Records Received Folder (Custom Content Type for Received Folder)
  - c. Records (Custom Content Type for Records received scanned documents)
2. All the records received folders will be stored inside the Order Folder.
3. All the records received documents will be stored in the respective Records Received Folder.
4. Each Records Received content type will have a Records Received Job Id.
5. All the other PDF documents, viz., Tscan Cover Page, Regular/Subpoena Request Packets, and Invoices will be created inside their respective Order Folders.

### 3.2.3 Alfresco Meta-data Synchronization.

Each Records Received content type will have a Records Received Job Id and the meta-data will be synchronized from the Records Received Folder.

### 3.2.4 Acordex Integration

All the PDF documents will be retrieved from Alfresco repository within Liferay Portal and will be displayed to the user using Acordex Image Viewer.

## 3.3 Liferay-Alfresco Integration Module

The Liferay-Alfresco Integration module provides access to Liferay portal with out-of-the-box Liferay portlets and custom portlets that integrate with Alfresco.

Custom Portlets:

- T-Scan User

Create Order Portlet/Wizard	Launches wizard to create order
Order Portlet	Views Modifies Existing Orders
Records Portlet	View Of Repository with Meta Search
Stats Portlet	View of Team and Individual Stats
Tasks Portlet	Lists Tasks By Order/Request or Filtered
Invoices Portlet	Lists Client Invoices Paid or Unpaid
Reports Portlet	Creates T-Scan Reports
My Communities Portlet *	View of Internal or External Communities





- Client User

Create Order	Opens Client Order Form
My Communities **	Displays Internal External Communities
Client Order Portlet	Displays Existing Client Orders based on Search
My Cases	Displays All Orders Open or Closed
My Records	Displays All Records or Records for Current Order
My Billing	Display All Invoices Open or Closed
Quick View New Records	Displays Records based on a Filter

\* My Communities Portlet for the T-Scan User consists of Internal Teams and External Clients as Internal and External Communities. Internal Communities are Limited to T-Scan Employees Only, External Communities can be a mixture of T-Scan and Consumer Users.

\*\* My Communities Portlets for Consumers consist of Internal Communities which are limited to members of a Firm and External Groups can be invited or public members of Organizations outside of the firm. An Outside person who is not a registered user can be invited to a Community if the User knows their email address. They are sent an invitation in the form of an email which contains a link to the registration form.

### 3.3.1 Create Order (T-Scan XLS Figure 9)

Create Order is the Step 1 of the Order Creation Wizard. (T-Scan XLS Figure )

SRS-3	When creating the Order, the client's profile can be created or should already exist in the Portal Database.	
SRS-4	Click on the Create Order Tab	
SRS-5	Create Order Wizard is opened.	
SRS-6	Ordering Party Information is Searched. While entering first few letters of Ordering Party name, matching results are shown in the Results box. At any point user can select one of the matching results (of client name and firm name) If Client does not exist a client is added by clicking new which opens the Add Client UI.	
SRS-7	From user profile billing address is populated for the selected client. This field is editable if the same as billing box remains unchecked	
SRS-8	If the shipping address is marked as same as billing address in user profile checkbox named "SAME AS BILLING ADDRESS" will be checked.. If shipping address is marked as different then check box is not checked and shipping address needs to be entered.	





## T-Scan User Order Wizard

order wizard begins order info	
date field	autopopulates tdy/h/m
priority field	normal, internal or billable rush
search clients field	search by firm, attorney, paralegal
search button	initiatates search
new button	opens add user profile
edit button	opens user profile in edit mode
role dropdown	attorney, paralegal, legal asst
address box	populates from user profile
same as billing checkbox	populates billing from user profile
recipients are billable checkbox	sets attribute for recipient matrix
telephone field	populates from user profile
alt telephone field	populates from user profile
fax number field	populates from user profile
alt fax field	populates from user profile
email field	populates from user profile
billing address	populates from user profile
delivery	us mail, hand deliver
processing	populates from user profile
order notes	displays order notes
notes field	enters order notes during creation
add button	adds notes to order
patient first name field	adds patient name to order
patient last name field	adds patient name to order
patient social security number field	adds patient ssn to order
file name field	adds file name to order
claim number field	adds file name to order
policy number field	adds policy number to order
case name field	adds case name to order
date of birth field	adds birth date to order
case number field	adds case number to order
file number field	adds file number to order
insured number field	adds insured number to order
client matter text area	adds client matter to text field
next button, cancel	moves to process instructions
	or cancels order



FIGURE 9

## Client User Order Form

opens client order form	
attorney	autopopulates from user template\logged in
paralegal	autopopulates from user template\logged in
firm	autopopulates from user template\logged in
address	autopopulates from user template\logged in
city,state,zip	autopopulates from user template\logged in
phone	autopopulates from user template\logged in
alt phone	autopopulates from user template\logged in
fax	autopopulates from user template\logged in
alt fax	autopopulates from user template\logged in
email	autopopulates from user template\logged in
billing is different	presents address fields user submits
patient name	user input (typed in by user)
case name	user input (typed in by user)
case number	user input (typed in by user)
other	user input (typed in by user)
social security number	user input (typed in by user)
alias	user input (typed in by user)
date of birth	user input (typed in by user)
expedited return button	marks order as billable rush
standard return	marks order as standard
record types window 1	display all record types
record types window 2	shows record type selected for order
add button	adds record type to order
remove button	removes record type from order
processing window 1	lists all ways records can be processed
processing window 2	shows processing type selected for order
add button	adds processing to order
remove button	removes processing from order
providers search	searches the provider database for provider
search button	initiates search
results window	shows results of provider search
add button	adds provider to order matrix
provider field	added by search or typed in
contact field	added by search or typed in



phone field	added by search or typed in
address field	added by search or typed in
city field	added by search or typed in
state field	added by search or typed in
zipcode field	added by search or typed in
add button	adds provider to database unverified
remove button	removes selected provider from matrix
other council textfield	adding recipients
search button	initiates search
results window	dispalys serach results
add button	adds council/recipient to the order
submit button	submits the order for verification
reset button	resets the entire form

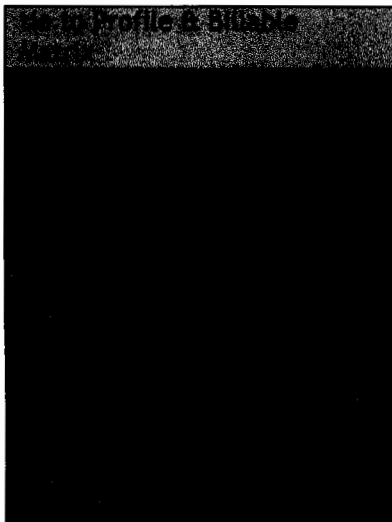
FIGURE 2: [REDACTED]

SRS-9	<p>Case Information is now entered by entering the following fields:</p> <ol style="list-style-type: none"> <li>1. Patient First Name</li> <li>2. Patient Last Name</li> <li>3. the name of the case</li> <li>4. patient's date of birth</li> <li>5. patient's social security number</li> <li>6. file name</li> <li>7. file number</li> <li>8. claim number</li> <li>9. policy number</li> <li>10. insured number</li> <li>11. client matter</li> </ol> <p>This data should be searchable and securely stored. User then clicks Next Button.</p>	
SRS-10	Processing Instructions should be added to the order. Once Processing Instructions are added, they should serve as a guideline for all requests on the order, but are editable by recipient at the request level.	
SRS-11	Processing Instructions are tied up to the client's profile as Processing Instruction Preferences and are displayed accordingly upon selecting a client. The Processing Instructions can be modified by the user. But this should not modify the client's preferences for the Processing Instructions in the Client's Profile.	



SRS-12	Notes written inside the Notes field should be made available in all the Task UIs of this Order. Which means when a user is creating the request the notes should be visible in the Request UI, likewise for Call Task, Records Received, Records Processed and QC. These should be either separate windows for the different types of notes or filterable by note type i.e. Call, Request, Order	
SRS-13	Order status is a dropdown box, with the following values: <ol style="list-style-type: none"> <li>1. Active</li> <li>2. Hold</li> <li>3. Close</li> <li>4. Archive</li> <li>5. Reopened</li> </ol>	
SRS-14	User should be able to lock an order by clicking the "Lock Order" button. A locked order will lock all the requests on an order. This means that there cannot be any modifications done to the Requests and the Order. When the user with "unlock permissions" can unlock the Order by clicking on the "Unlock Order" button. This should release the lock on all the Requests as well.	
SRS-15	User Clicks next to go to the next step in the wizard	

<b>Order Processing</b>	
add processing instructions window	allows adding instructions to order
add button	adds processing from list to order
current selected window	displays instructions from group profile
remove button	removes instructions from the order
processing summary window	displays all instructions currently on order
consecutive bates checkbox	alerts processing department to consecutive bates
order notes window	displays order notes added in order info step
next button	goes to add requests ui
back button	goes back to order info







### 3.3.2 Adding Recipients to Order/Request (T-Scan XLS Figure)

Adding Recipients is the Step 2 of the Order Creation Wizard.

SRS-16	Next step of the wizard is the user is now able to Add Recipients.
SRS-17	User can select multiple Recipients from the list box. Search and Results Box
SRS-18	Each selected Recipient can be added to a single Request or multiple requests from the list of Requests. Recipients are added at the order level or to requests. Recipients are added to the order, then populate the requests or added to each individual request.
SRS-19	Recipients are billed based on whether the billable checkbox in the recipient matrix is checked. The billable checkbox will be prechecked if the Order is for Washington States  Recipients will receive all the documents for which request they are part off.
SRS-20	"Bill the Recipient" check box if checked will create an invoice for the recipient
SRS-21	Clicking Add then adds them to the list. Clicking update adds them to the Recipient Matrix Clicking save then saves the matrix throughout the order
SRS-22	If Recipients are added to an Order after the Order is completed, then based on the selections, the recipients should receive the electronic records and if "Bill the Recipient" is checked then the Recipient should receive the invoice immediately.
SRS-23	When Recipients are added, the status of the recipients will be set as undelivered/unbilled.
SRS-24	When the records are delivered and the invoice is triggered from the QC task, Recipient's status will be set as delivered/billed.
SRS-25	Recipients receive records based on the profile of the ordering party, however this is editable via the Recipient Matrix under the process column. This is saved at the order or request level.
SRS-26	User then clicks back or next to go to the add request part of the Wizard. The Ordering Party is always the first recipient and the Order must have a minimum of one request.





ADD RECIPIENTS	
search recipients text box	searches user database
search button	initiates search
new button	opens add user ui
edit button	edits an existing user
role dropdown	opposing counsel, co counsel
billing profile dropdown	non billing matrix
type dropdown	claims rep etc
add text box	displays existing users as recipients
remove text box	shows existing users as recipients
add button	adds existing users as recipients
remove button	removes existing users as recipients
update button	updates the recipient matrix
save button	saves the recipients to the order
delivery dropdown	chooses methods records are delivered
RECIPIENT MATRIX	
back, next buttons	forward to add requests,back

### The Billing Matrix

BILLING MATRIX		
abc checkbox and amount field	charge	non ordering party
add checkbox and amount field	misc	
afc checkbox and amount field	misc	abc checkbox and amount field
basic checkbox and amount field	charge	cleric 2 checkbox and amount field
bates checkbox and amount field	misc	clerical checkbox and amount field
billpp checkbox and amount field	charge	copies1 checkbox and amount field
cbates checkbox and amount field	misc	copies2 checkbox and amount field
cleric checkbox and amount field	charge	ftp checkbox and amount field
cleric 2 checkbox and amount field	misc	tabs checkbox and amount field
clerical checkbox and amount field	misc	xray checkbox and amount field
copies checkbox and amount field	misc	
copies1 checkbox and amount field	misc	
copies2 checkbox and amount field	misc	abc checkbox and amount field
dxray checkbox and amount field	misc	usps checkbox and amount field
email checkbox and amount field	misc	electronic checkbox and amount field
fiche checkbox and amount field	misc	fedex checkbox and amount field
films checkbox and amount field	misc	dhl checkbox and amount field



flist checkbox and amount field	misc	hand delivery check box and amount field
ftp checkbox and amount field	misc	misc charges checkbox and amount field
label checkbox and amount field	misc	
laser checkbox and amount field	misc	
mabc checkbox and amount field	misc	
mail checkbox and amount field	charge	
mbasic checkbox and amount field	misc	
mbench checkbox and amount field	misc	
mcdstor checkbox and amount field	misc	
mcleri checkbox and amount field	misc	
media checkbox and amount field	charge	
miles checkbox and amount field	charge	
misc checkbox and amount field	misc	
mmail checkbox and amount field	misc	
mmisc checkbox and amount field	misc	
mocr checkbox and amount field	misc	
mpark checkbox and amount field	misc	
mprepa checkbox and amount field	misc	
mprov checkbox and amount field	misc	
mrush checkbox and amount field	misc	
mstat checkbox and amount field	misc	
msub checkbox and amount field	misc	
mtabs checkbox and amount field	misc	
mxray checkbox and amount field	misc	
mxstor checkbox and amount field	misc	
ocr checkbox and amount field	charge	
pages checkbox and amount field	misc	
park checkbox and amount field	charge	
path checkbox and amount field	misc	
phone checkbox and amount field	misc	
prepay checkbox and amount field	charge	
prov checkbox and amount field	charge	
rush checkbox and amount field	charge	
sales tax checkbox and amount field	misc	
scan checkbox and amount field	misc	
stat checkbox and amount field	charge	
stip checkbox and amount field	misc	



sub checkbox and amount field	charge
supd checkbox and amount field	misc
tabs checkbox and amount field	charge
tif checkbox and amount field	misc
xray checkbox and amount field	charge
credit hold checkbox and amount field	misc

FIGURE 13

#### Current Recipients Matrix

RECIPIENT MATRIX	
first name field	populated from user info
last name field	populated from user info
firm name field	populated from user info
phone number field	populated from user info
specialist field	populated from user info
role field	populated from user info
process field w/modify button	populated from user info
billing field w/modify button	populated from billing matrix
billable field with checkbox	creates invoicing for recipients

FIGURE 14

#### 3.3.3 Request Creation (T-Scan XLS Figure)

Request Creation is the Step 3 of the Order Creation Wizard.

Question: How does the UI support adding multiple Requests for an order. Each Provider added with Record Types is considered an Individual Request.

SRS-27	Once the order is created the user should be able to add more Requests to the Order.
SRS-28	User clicks Next, which opens the Add Request UI. Depending on whether the Request is Standard or Subpoena a Standard or Subpoena UI will be opened for the add request.
SRS-29	User should be able to modify the Recipients, that were added earlier to the Order The Recipient Matrix should be visible under every request with the process and bill modify option available Recipients are removed from the Order or Request Via the Remove Checkbox



SRS-30	The Order Notes should be displayed. Order Notes, Request Notes; or this will distinguish between the notes based on what UI the user is on. If he is on the Call UI and a note is entered it can be filtered as a call note, or display all three windows Order, Request, Call																																														
SRS-31	User should be able to enter the Request Notes in the Request Notes Field. Request notes apply to the request being viewed or created.																																														
SRS-32	<p>User will enter the following data:</p> <p>Standard Request</p> <table border="1"> <tr> <td>search providers field</td><td>searches provider database</td></tr> <tr> <td>request type dropdown</td><td>request types box</td></tr> <tr> <td>priority dropdown</td><td></td></tr> <tr> <td>delivery method dropdown</td><td>how records are delivered</td></tr> <tr> <td>expiration date field</td><td>when request expires</td></tr> <tr> <td>search results box</td><td>results provider search</td></tr> <tr> <td>add button</td><td>adds provider to add box</td></tr> <tr> <td>new button</td><td>opens add provider ui</td></tr> <tr> <td>remove button</td><td>removes a provider</td></tr> <tr> <td>added box</td><td>shows providers added</td></tr> <tr> <td>provider summary box</td><td>shows provider info</td></tr> <tr> <td>request list box</td><td>shows current requests in order</td></tr> <tr> <td>records requested box</td><td>lists record types</td></tr> <tr> <td>add records button</td><td>adds records types to list</td></tr> <tr> <td>remove records button</td><td>removes records from list</td></tr> <tr> <td>create records button</td><td>creates a new record type</td></tr> <tr> <td>join provider to records button</td><td>joins provider to record types</td></tr> <tr> <td>provider plus records list box</td><td>shows provider plus record type</td></tr> <tr> <td>authorizations box</td><td>tbd</td></tr> <tr> <td>current recipients matrix</td><td>shows current recipients in order</td></tr> <tr> <td>provider matrix</td><td>shows providers added to order</td></tr> <tr> <td>generate packet button</td><td>generates packet for checked matrix</td></tr> <tr> <td>back, cancel, save buttons</td><td>save generates the order</td></tr> </table>	search providers field	searches provider database	request type dropdown	request types box	priority dropdown		delivery method dropdown	how records are delivered	expiration date field	when request expires	search results box	results provider search	add button	adds provider to add box	new button	opens add provider ui	remove button	removes a provider	added box	shows providers added	provider summary box	shows provider info	request list box	shows current requests in order	records requested box	lists record types	add records button	adds records types to list	remove records button	removes records from list	create records button	creates a new record type	join provider to records button	joins provider to record types	provider plus records list box	shows provider plus record type	authorizations box	tbd	current recipients matrix	shows current recipients in order	provider matrix	shows providers added to order	generate packet button	generates packet for checked matrix	back, cancel, save buttons	save generates the order
search providers field	searches provider database																																														
request type dropdown	request types box																																														
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remove button	removes a provider																																														
added box	shows providers added																																														
provider summary box	shows provider info																																														
request list box	shows current requests in order																																														
records requested box	lists record types																																														
add records button	adds records types to list																																														
remove records button	removes records from list																																														
create records button	creates a new record type																																														
join provider to records button	joins provider to record types																																														
provider plus records list box	shows provider plus record type																																														
authorizations box	tbd																																														
current recipients matrix	shows current recipients in order																																														
provider matrix	shows providers added to order																																														
generate packet button	generates packet for checked matrix																																														
back, cancel, save buttons	save generates the order																																														
SRS-33	If the Request Type is Standard, refer to 2.3.1 Standard Request, if the Request Type is Subpoena, refer to 2.3.2 Subpoena Request.																																														





## Subpoena Request UI

Subpoena UI	
search providers field	search provider database
request type dropdown	chooses type and launches ui
priority dropdown	
delivery method dropdown	
expiration date field	date request expires
search results window	shows search results of providers
add button	adds a provider to add window
new button	opens provider ui in edit mode
remove button	removes a provider from the add box
add window	shows added providers
provider summary window	shows provider info
records requested window	shows record types
add button	adds a record type to the add window
remove button	removes a record type from the window
create button	creates a new record type
join button	joins a record type(s) to a provider
records added window	shows all records added
provider + record type window	shows provider + records
authorizations box	check for authorizations
current recipients matrix	shows recipient matrix
caption window with fields	shows case caption editable
county field	shows county editable
manner of service dropdown	certified mail or hand delivery
service location window	providers address
deposition location window	location for deposition
client attorney bar number	alphanumeric field





standard	
email	del
up	and filtered

PLAINTIFF NAME	PLAINTIFF/CLAIMANT	DEFENDANT NAME	DEFENDANT/RESPONDENT	CASE NUMBER
-------------------	--------------------	-------------------	----------------------	-------------

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#### 3.3.4 Standard Request (T-Scan XLS Figure)

SRS-1	User will click on "Create Packet" checkboxes for each provider. This should complete the Request process and create a PDF packet.
SRS-2	More info about the Packet creation....needs to be added here (Please Provide me the questions?)
SRS-3	Once the PDF packet gets created a Call task should get generated for this request and is added to the incomplete tasks queue. For more information on the Call Tasks refer to 2.4 Call History.
SRS-4	

#### 3.3.5 Subpoena Request (T-Scan XLS Figure)

SRS-5	User will check boxes next to providers to create packet only checked boxes will generate a packet. Once the button is then pressed, the packets will generate and the packet status field in the provider matrix will now change to complete
SRS-6	Packets are generated from T-Scan templates as either editable Tiffs or PDFs. Packets are generated based on whether the request is a Standard or Subpoena Request
SRS-7	Once the PDF packet gets created a Call task should get generated for this request and is added to the incomplete tasks queue. For more information on the Call Tasks refer to 2.4 Call History.



## 3.2.5a Contents of Packets By Type, State and Recipients

<b>WA SUBPOENA</b>
<b>DOCUMENT FOR OUR CLIENT FOR SIGNATURE</b>
CR45 Subpoena(Deposition/Records Only)

<b>NOTICE PACKET -PROVIDER</b>
Notice Letter(Medical/NON-Medical)
Copy Signed CR 45 Subpoena Doc

<b>NOTICE PACKET-PA/OC/CC</b>
Notice letter-PA/OC/CC
Copy of each Provider Notice Letter
Copy of each signed CR 45

<b>SERVICE PACKET-PROVIDER</b>
Service Letter for Provider(Deposition/Records Only)
Copy of signed CR45
Film list
Certification Page
Resale Certificate
Certificate of Satisfactory Assurance

	<b>MANNER OF SERVICE</b>
<b>SERVICE PACKET FOR PA/OC/CC</b>	<b>HAND DELIVERY</b>
Service Letter for PA/OC/CC	Affidavit of Service
Copy of Service Letter to Provider	T-Scan Internal Runner Request Form
OC Order Form	
Copy of signed CR 45	



Film List	
Certification Page	
Resale Certificate	
Certificate of Satisfactory Assurance	

OR SUBPOENA	
DOCUMENT FOR OUR CLIENT FOR SIGNATURE	NOTICE PACKET - PA
ORCP 55 Subpoena Draft	Notice Letter
Certificate of Service	Subpoena Draft
Copy of PA Notice Letter	

SERVICE PACKET - PROVIDER	SERVICE PACKET - PA
Service Letter	Service Letter to PA
Signed ORCP 55 Subpoena	Copy of Provider Service Letter
Signed Certificate of Service	Signed ORCP 55 Subpoena
Film List (if applicable)	Signed Certificate of Service
T-Scan Certification page	Film List (if applicable)
Affidavit of Service	T-Scan Certification page
	Affidavit of Service

REGULAR PACKET
Fax Cover
Cover Letter
Film List
Certification
Resale Certification





REQUEST SUMMARY-Order # - Patient Name – Request Type – Ordering Party-Ordering Party Phone #

 PRIORITY  REQUEST TYPE  DELIVERY METHOD  EXPIRATION DATE

PROVIDER	CONTACT	PHONE	FAX	PACKET	STATUS
Harborview	Joe Rabbit	212-555-8777	212-555-9999	<input checked="" type="checkbox"/>	Completed
				<input checked="" type="checkbox"/>	
				<input checked="" type="checkbox"/>	

Generate Packets

FIRST NAME	LAST NAME	FIRM	PHONE	SPECIALIST	ROLE	PROCESS	BILL	BILLABLE
ROBERT	RABBIT	RABBIT LAW	212-555-1212	212-553-9999	Opposing Counsel	HOLLERBECK (ROBIFY)	HOLLERBECK (ROBIFY)	<input checked="" type="checkbox"/>

BACK

NEXT

### 3.3.5.1 Request Summary View

SRS-34	Once all the request fields are entered next button is clicked and request summary view is displayed. Request summary displays all the entered values in request form. Summary displays information related to 1 request (request which is the scope)
SRS-35	When Generate Provider Packet is checked that provider will be ready to have a packet generated. This will be based on the request type. Once all the checkboxes are clicked, the packets will generate and the status of the packet will be switched to completed. Packets can be generated individually.
SRS-36	When save button is clicked a transaction is started on the server. Transaction saves the request in scope data and generates the required package information from the template and stores in Alfresco.  Data will be saved in tables for every step and have a field which is used to show us a summary of where are we (how complete is the order).
SRS-37	Call tasks are generated based on the call tasks matrix for each request saved. This is also a part of the transaction mentioned in "SRS-51".





## 3.3.5.2 Order Summary View

SRS-38	After all the requests (there can be multiple requests) are reviewed in request summary view and added next step is to show order summary view.
SRS-39	All the details entered on tabs "Order", "Processing", "Recipients" and "Requests" are shown in the right side view.
SRS-40	On the left side, there will be a text field with Auto-complete (AJAX-style) feature where search results are populated when user is entering in the search box. The results displayed are the call tasks that are auto-generated when user saves request.

ORDER SUMMARY		
patient first name	first name populates from order	read only
patient middle name	middle name populates from order	read only
patient last name	last name populates from order	read only
patient ssn	ssn populates from order	read only
date of birth	dob populates from order	read only
dol	dol populates from order	read only
case name	case name populates from order	read only
claim number	claim number populates from invoice	read only
insured name	insured name populates from invoice	read only
case number	case number populates from invoice	read only
file number	file number populates from invoice	read only
client matter	client matter populates from invoice	read only
order notes fields	populates or added here	editable
request notes fields	populates or added here	editable
call notes field	populates or added here	editable
task list	links to tasks	read only
filter by dropdown	calls, complete, incomplete	read only
processing instructions window	processing from order or profile	read only
requests window	links to requests	read only
filter by dropdown	complete, incomplete	read only
add request button	opens add request form from	na



	wizard	
attorney field	attorney name	read only
phone	attorney phone	read only
fax	attorney fax	read only
email	attorney email	read only
company/firm	attorney firm	read only
address1	attorney address	read only
address2	attorney address	read only
city	attorney city	read only
state	attorney state	read only
attorney zipcode	attorney zipcode	read only
paralegal	attorney paralegal	read only
provider matrix	from order\request\subpoena	editable
recipient matrix	from order\request\subpoena	editable

**THIS COMPLETES THE ORDER CREATION PROCESS. THE ORDER IS NOW SEARCHABLE AND ADDITIONAL TASKS CAN BE COMPLETED BY THE ORDER PORTLET.**

### 3.3.6 Call History

	Call task is auto-generated when the Request gets created.
	Depending on the Request's Priority, the scheduled date is set for the call task.
	If the Priority is "Normal" then the scheduled date will be 2 days from the date the call task is created.
	The call task will be created with the status as "Incomplete" and "unclaimed"
	If status is "Incomplete", the call task will be displayed to the specialists in their call task queue. This is by team and then by the person who claimed the task this should be filtered by Client - Team - Individual. Unclaimed tasks can be viewed by the whole team.
	The T-Scan User will open the call task by clicking on a specific call task's link and the Call task UI will be opened. From the Task UI or Call Tab in the Order Portlet
	The T-Scan User will then claim the call task and the status of the call task will now be "Claimed" and will be assigned to the T-Scan User who opened it.
	The T-Scan User will see all the "Incomplete" call tasks and the call tasks that are assigned to them in their call task queue. Subsequently they should be able to see all tasks related to an order and filter them as necessary.

1st Day	2nd Day
3rd Day	4th Day
5th Day	6th Day
7th Day	8th Day
9th Day	10th Day
11th Day	12th Day
13th Day	14th Day
15th Day	16th Day
17th Day	18th Day
19th Day	20th Day
21st Day	22nd Day
23rd Day	24th Day
25th Day	26th Day
27th Day	28th Day
29th Day	30th Day
31st Day	32nd Day
33rd Day	34th Day
35th Day	36th Day
37th Day	38th Day
39th Day	40th Day
41st Day	42nd Day
43rd Day	44th Day
45th Day	46th Day
47th Day	48th Day
49th Day	50th Day
51st Day	52nd Day
53rd Day	54th Day
55th Day	56th Day
57th Day	58th Day
59th Day	60th Day
61st Day	62nd Day
63rd Day	64th Day
65th Day	66th Day
67th Day	68th Day
69th Day	70th Day
71st Day	72nd Day
73rd Day	74th Day
75th Day	76th Day
77th Day	78th Day
79th Day	80th Day
81st Day	82nd Day
83rd Day	84th Day
85th Day	86th Day
87th Day	88th Day
89th Day	90th Day
91st Day	92nd Day
93rd Day	94th Day
95th Day	96th Day
97th Day	98th Day
99th Day	100th Day

Proposal for T-Scan Alfresco Liferay Portal Implementation – CONFIDENTIAL –BPA Technologies Inc., 2008 – Page 29

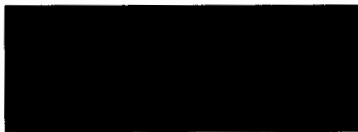


hold task check box	holds the current task
number of days check box	allows hold for one interval
call notes window	call notes
update button	updates the call notes
order notes window	shows order notes
request notes window	shows request notes
save button	saves the call task

FIGURE 37

bpa logo

bpa logo







CALL TASK - FIG 37

CURRENT DATE & TIME ORDER # - CLIENT NAME - PATIENT NAME - PROVIDER PHONE NUMBER TIME EXPENDED CALL TYPE OUTBOUND

REQUESTS PATENT INFORMATION RECORD STATUS

CALL TASKS ADDITIONAL REQUESTS WITH THIS PROVIDER CALL RESULTS CALL INFO

LIVE ANSWER ☐ NO RECORDS ☐ VOICE MAIL ☐ REQUIRE PREPAY ☐ HOLD TASK ☐ DAYS

ADDITIONAL REQUEST INFO

UNCLAIMED UNCLAIMED CLAIMED

ORDER NOTES REQUEST NOTES

SRS-1	Records received task UI is opened to enter the details about the records that are received from the Providers as per the request.
SRS-2	The user will track the condition of the records received by verifying the condition of the records and completeness of the records. This is done by filling in the fields. Refer to the Records Received Matrix below.
SRS-3	The user clicks on the "Done" button. This should trigger a "Create Job Order" popup (AJAX Style).



SRS-4	In the "Create Job Order" popup UI, the user clicks "OK" the Job Id is generated and a Tscan Cover Page which is a PDF document gets created.
-------	---

RECORDS RECEIVED TAB	
search orders field	search orders by client\patient\order #
results box	shows results of search
order summary window	shows a summary of the order
requests window	shows requests as links
task history	shows all tasks
date field	shows current date and time
order notes window	shows all order notes
request notes window	shows all request notes
call notes window	shows all call notes
receiving notes window	shows receiving notes
receiving notes sub window	allows adding of receiving notes
edit button	edit button edits receiving notes
add button	adds receiving notes
record matrix	shows record received matrix
do not print pages checkbox	does not print job ticket if checked
update button	updates the current ui
save button	saves the records received task.

FIGURE 30



RECORDS RECEIVED - FIGURE 30

ORDER# - PATIENT-PROVIDER-CLIENT-RECORD TYPE

Search Orders

Results

Order Summary

Requests

DATE

Task History

ADD

ORDER NOTES

REQUEST NOTES

CALL NOTES

RECEIVING NOTES

RECORD TYPE	FULL	PARTIAL	NO RECORD	CERT	REMOVE RECORD
MEDICAL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BILLING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUTHORIZATIONS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ADD

ADD

☐ DO NOT PRINT PAGES

ADD

ADD

### Records Received Matrix

Method Received	Drop Down	Delivery/Pickup
Clinical Fee	Drop Down	If Charge Bill Matrix Charge
If Not Charged	Text	Reason Notes
Notes	Text Not Box	Comments
Record Condition (Medical)	Drop Down	See Below
Additional Records	Drop Down	No/Yes
Date Completed	Date Field	MM/DD/YY
Certification Received	Check Box	Certification Received



Record Condition Field Triggers the call queue as detailed below

Field	
None	
Full w/o Cert	
Partial	
No Records	
Remove from Request	
Full *	

\* Full/W Cert is removed as discussed with Andre

#### Records Processed

	The user clicks on the Records Processed Task to view the Records Processed UI for the Records Received and the Request.
	All the data is entered in the respective fields.
	The user clicks on "Done" button. The Processed task is completed and the QC task is triggered and is the status is set as "Incomplete" Records processed is now at the QC task Please review this under the new UI and instructions

RECORDS PROCESSED	
request list window	lists requests based on active order
edit button	opens the highlighted request in edit
order information window	lists all information about order
order notes window	lists order notes
processing summary	lists processing instructions
processing notes	allows for adding of processing notes
processing instructions checkbox(s)	checkmark indicates processing complete
save button	saves process
cancel button	cancels processing

FIGURE 34





## Records Processed -Figure 34

ORDER # - CLIENT - PATIENT NAME - CLIENT PHONE #

REQUEST LIST

ORDER INFORMATION

ORDER NOTES

PROCESS SUMMARY

PROCESSING NOTES

REQUEST NOTES

PROCESSING INSTRUCTIONS (CHECKMARK INDICATES COMPLETED)

BATES	<input type="checkbox"/>
TWO HOLE PUNCH	<input type="checkbox"/>
TAB	<input type="checkbox"/>

## 3.3.7 QC

	The user finds the incomplete QC task in the QC Task Queue. QC Task will now be generated after all boxes are checked in the records processed UI to indicate the record has been processed
	The user clicks on the task to open the QC task UI for that particular Order and Request.
	The user will enter the following data based on the matrix given below: Refer to the QC UI Matrix
	If the QC task passes the Request, the record and invoices are delivered to the client as a PDF and stored in the application database and distributed to MAS90 via a SQL Transaction. The Ordering Party and Non-Ordering Party's status for that record becomes "Delivered"
	If the request is the last request that completes the Order, then the Order is closed.
	If the Order is closed, the Order is now added to the Completed Order History. The status of the Order is now closed.



QUALITY CONTROL	
order summary window	order information
record type	record(s) types
processing instructions	processing summary
request summary	summary of request
records processed matrix	record settings
mileage charges links window	opens mileage detail
additional process notes	notes field
x-ray # of films numeric box	numeric box
x-ray # of cd's numeric box	numeric box
provider fee radio button	activates bill pay
prepay radio button	prepay info
wac radio button	selects wac chart
none radio button	selects none
cert only checkbox	cert only
film list check box	film list
cnr number of films	numeric field
bill pay invoice number field	numeric input
bill pay amount field	currency field

qc recipients matrix	recipient info
hold check box	holds order
sent back checkbox	creates process task
sent back reason field	creates task reason
order notes window	order notes
request notes window	request notes
call notes window	call notes
qc notes window editable	for adding qc notes
provider matrix	shows providers
done button	completes request



## QC Recipient Matrix

QC RECIPIENTS MATRIX	
name field	last, first
firm or company field	firm field
role	cc, oc
distribution dropdown	us mail, hand ups, fedex
invoice field	billable?
number of copies field	numeric

Figure 35



## The QC UI Matrix

QUALITY CONTROL-FIG 36

ORDER #-CLIENT-PATIENT-PROVIDER-PROVIDER PHONE -RECORD TYPE

## ORDER SUMMARY

## RECORD TYPE

BILLING RECORD

## PROCESSING INSTRUCTIONS

## REQUEST SUMMARY

## ORDER NOTES

## QC NOTES

RECIPIENTS FIGURE - 35

ROLE	NAME	FIRM OR COMPANY	DISTRIBUTION	INVOICE	# OF COPIES
OPPOSING	JOE RABBIT	RABBIT LAW	<input type="text"/>	<input type="text"/>	<input type="text"/>
CO COUNSEL	JESSICA RABBIT	RABBIT LAW	<input type="text"/>	<input type="text"/>	<input type="text"/>

## RECORDS PROCESSED

PAGES	<input type="text"/>	BATES	<input type="text"/>
COLOR	<input type="text"/>	SCANS	<input type="text"/>
TABS	<input type="text"/>	FAX	<input type="text"/>
MICROFICHE	<input type="text"/>	OTHER	<input type="text"/>

## DESCRIPTION OF ADDITIONAL PROCESS CHARGES

## X-RAY RECORDS

NUMBER OF FILMS	<input type="text"/>
NUMBER OF CD'S	<input type="text"/>

☒ PROVIDER FEE (BILL PAY)☐ PRE-PAY☐ WAC☐ NONE☒ CERT ONLY☒ FILM LIST☐ CNR OF FILMS

BILL PAY INVOICE #

BILL PAY AMOUNT

 \$

## MILEAGE CHARGES

MILEAGE	<input type="text"/>
PARKING	<input type="text"/>
TOLLS	<input type="text"/>
FERRY	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

## TRAVEL NOTES

## PREPAY'S

## REQUEST NOTES

## CALL NOTES

SENT BACK REASON

☐ HOLD☐ SENT BACK





## Actions in QC UI

Hold	Button	Stops QC Task
Sent Back	Button	Creates Sent Back Process Task*
Done	Button	Record/Invoice Delivered
Search By	Text Label	Describes Search Feature
Filter By	Text Field or Drop Down	Selects Search Criteria
Preview Invoice	Button	Preview Invoice or Billing Info

### Billing

	<p>There are 2 kinds of Invoices we need to generate in billing module (Billing module functions as a background process to the QC module).</p> <p>Invoice for the ordering party</p> <p>Invoice for the non ordering party.</p> <p>Invoices for Ordering Party: All the costs that are incurred while collecting required documents + the charges from the billing matrix for ordering party are added a invoice is generated.</p> <p>Invoices are generated with "GENERATE INVOICE" button is clicked.</p>
	For Invoice for a non Ordering Party (recipients) Invoice is generated based on the billing matrix (for recipients) only.

### Reports

	<p>Report Name: Request By Date</p> <p>Input Fields:</p> <p>Start Date,</p> <p>End Date</p> <p>Once Submitted the following report will be generated.</p> <p>Generated Report Fields:</p> <p>Order Code: Order code created when an order is created in the database. This will also be a hyperlink. Click order code hyperlink will open UI describing the order contents.</p> <p>Date: Date on which request was added.</p> <p>Provider: For each request there will be a provider so the provider name displayed here.</p>
	<p>Report Name: Recently Updated Request</p> <p>Input Fields:</p> <p>Date : Date from request has been modified.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Order Code: Order code is hyperlink, when clicked will show details of order.</p> <p>Date: Date when the modification has happened.</p> <p>provider: provider name.</p> <p>Record Type: will indicate is this is a Regular request or Subpoena request.</p>



	<p>Report Name: Request by Order Code</p> <p>Input Fields:</p> <p>Order Code: Lets confirm, this also involves wildcard (*)?</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Reports Fields:</p> <p>Order Code : hyperlinked to open UI for details of Order.</p> <p>Date: Date when the order is created.</p> <p>provider: Names of the providers (I think we need to put request name or/and number here as providers are more tightly linked to request).</p> <p>Record Type: type of the records requested. (these will be multiple for a request so makes more sense to include request information also in this report?)</p>
	<p>Report Name: Tasks By Users and Client.</p> <p>Inputs Fields:</p> <p>Owner List Box : All the tscan users who are handling some part of the business process will be visible here. Question: This would be multi selection enabled by CTRL click or other means</p> <p>Task Type List Box: All the Tasks that are defined in Business Process. This would be multi selection enabled by CTRL click or other means</p> <p>Client List Box: the entire client for Tscan. This would be multi selection enabled by CTRL click or other means</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>No. Serial number</p> <p>Date: date when the task was created (? confirm)</p> <p>Task Type: Defines the types of the task, hyperlinked to open UI describing the task type.</p> <p>Status: Current Status of the task.</p> <p>Client: Name of the client.</p> <p>Patient: Name of the patient.</p> <p>provider: Names of the provider There will be a one to one mapping between provider and task There will not be one to one mapping between request and task?)</p> <p>Owner: Owner of the task in Tscan.</p>
	<p>Report Name: Outstanding Requests</p> <p>Input Fields:</p> <p>No Inputs</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Weeks: How many weeks this request has been outstanding.</p> <p>Requests: Number of requests. This needs to be on a per request basis</p> <p>Percentage: Is there a Matrix which defines how to calculate percentage? No Since this is a comparison by month I would assume that the average of the months would be 100%, and then the percentage of that average would denote the amount of gain or loss in regards to the requests.</p>



	<p>Report Name: Request Turnaround</p> <p>Input Fields: List box: Client Users.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Weeks: How many weeks did the request take to turnaround. Requests: Number of requests whose records are received By Provider Percentage: Is there a Matrix which defines how to calculate percentage?</p>
	<p>Report Name: Request By State</p> <p>Input Fields: No Input Fields</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>State Of Provider: State where the provider is. No Of Requests: Number of requests associated for a particular state.</p>
	<p>Report Name: Task Completion report.</p> <p>Input Fields: Owner: Owner of the Task (this will be an internal TScan employee) Task Type: Type of the Task. Start Date: start date on which the task needs to fall after End date: End date of the task</p> <p>Combination of start date and end date is the date range in which the task falls.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Date: Date of the Task Number of tasks completed by the selected user. (or owner)</p>
	<p>Report Name: Records received Report</p> <p>Input Fields: Days Back.: The number of days back from now we need to start the start date. In terms of date range is the number of days back as start date and today's date as the end date.</p> <p>Combination of start date and end date is the date range in which the task falls.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Date : From system date number of days entered. (I think it should be called as Days not date, Date is how it is mentioned in the excel document, please correct.) No. Of Requests: Hyperlinked and opens up UI with records received for Task, opens the descriptive report with ordercode/patient/provider/record type.</p>



	<p>Report Name: processed pages report</p> <p>Input Fields:</p> <p>Start date</p> <p>End date</p> <p>Date range from start date and end date.</p> <p>Combination of start date and end date is the date range in which the task falls.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Copies</p> <p>Total pages processed.</p>
	<p>Report Name: provider packets by month</p> <p>Input Fields:</p> <p>Month : Month which we are checking for.</p> <p>Year: Year which we are checking for .</p> <p>Date range from start date and end date.</p> <p>Combination of start date and end date is the date range in which the task falls.</p> <p>Report is generated when Submit button is clicked.</p> <p>Generated Report Fields:</p> <p>Client: Client for which we are processing.</p> <p>Specialist: Specialist who is dealing this</p> <p>Previous Month: Number of packets sent in previous month.</p> <p>Selected Month: Number of packets sent in selected month.</p> <p>Difference: difference between the numbers of packets sent.</p> <p>Difference percentage: What was the percentage in difference compared to the previous month?</p>

Commonalities - T-Scan User Sidebar should be accessible from all tabbed Views

Client Sidebar should be accessible from all Client Tabbed Views

The Tutorial Button will provide a Tutorial of the site which will be compiled by T-Scan. Provision for the button in the sidebar with a popup tutorial should also be available.

REPORTS	
by date range	creates a report by date range
from field	enter starting date of range
to field	enter ending date of range
date checkbox	activates current criteria
by client order checkbox	activates current criteria
search field	search client database
search results box	displays and allows selection
quick reports checkbox	activates current criteria





FIGURE 20

QUICK REPORT TYPES	
kpi	kpi report
requests	requests by date range\order\client
tasks by user	tasks by user
outstanding requests	outstanding requests
task completion report	completed tasks
records received	records received
processed pages	records processed
provider packets	packets sent
billable tasks	billable tasks

FIGURE 21

**T-Scan Reports Generator**

**BY DATE RANGE**

FROM: \_\_\_\_\_ TO: \_\_\_\_\_

**BY CLIENT/ORDER**

SEARCH: \_\_\_\_\_

CLICK SELECTION OR CTRL CLICK FOR MULTIPLE SELECTIONS

**Quick REPORTS**

- ☐ KPI
- ☐ REQUESTS
- ☐ TASKS BY USER
- ☐ OUTSTANDING REQUESTS
- ☐ TASK COMPLETION REPORT
- ☐ RECORDS RECEIVED
- ☐ PROCESSED PAGES
- ☐ PROVIDER PACKETS
- ☐ BILLABLE TASKS

**By ORDER**

- ☐ OC TASKS
- ☐ CALLS
- ☐ RECORDS RECEIVED
- ☐ RECORDS PROCESSED

**By BILLING**

- ☐ COMPLETED INVOICES
- ☐ CAP AD INVOICES
- ☐ BILLABLE TASKS
- ☐ PREPAYS





### **3.4 Corporate Overview Module**

The module provides general website corporate overview information about T-Scan as a static content. This module provides a generic view for the Tscanonline website. The module implements and supports static web content for

- About Us
- Services
- Our Team
- Mission
- FAQ
- Contact Us
- Law Firms Liabilities
- Insurance Carriers
- Class Action and Product Liability
- Production Services
- Records Processing
- Our Processing
- Careers

### **3.5 Services Module**

The services module provides general website services information and will also allow the users to access the services such as Record Retrieval, Court Reporting, Referral Network etc., The users who are attorneys/paralegals will be allowed to create orders and submit these order requests to the T-Scan employees.

### **3.6 News/Events Module**

This module provides information about news and events, the content for this module will be dynamic and will be published using a content authoring tool.

- Dynamic Content for News/Events: Building a Web Content Management only for one specific content page will not be an ideal solution. So BPA recommends using a simple Web-Authoring tool to publish this page.

### **3.7 Management Module**

This module provides T-Scan's management's information in a hierarchical format.

### **3.8 Contact Us Module**

The Contact Us module will have a form and the users will be able to fill this information and submit to T-Scan.

For Sections 3.3 to 3.7 the required content and links will be provided by Tscan.



## **4.0 Provision for Future Roadmap**

T-Scan has a future roadmap for applications which will be built into the website. The design of the web application is made to fit in the future components that T-Scan intends to build. The modules are mentioned below:

### **4.1 Court Reporting Services**

The scope of this engagement is the design of TSCANONLINE.COM.  
At a high level, the website involves the following:

1. Upload document to the Court Reporter space
2. Calendar function
3. Book a Court Reporter
4. Send Request to Tscan
5. Tscan Schedules a Court Reporter
6. Rating

### **4.2 Referral Network**

The scope of this engagement is the design of TSCANONLINE.COM.  
At a high level, the website involves the following:

1. Upload document to the user space
2. Calendar function
3. Book an Expertise
4. Send Request to Tscan
5. Tscan Schedules the Expertise
6. Rating

### **4.3 News/Events**

The scope of this engagement is the design of TSCANONLINE.COM.  
At a high level, the website involves the following:

1. User will have a Web Authoring Tool which will allow the user to publish the content as News/Events.



## 5.0 Timelines/Schedule

The schedule for the project is based on a 15-work week delivery timetable starting from 22<sup>nd</sup> December 2008, as indicated in the table below.

### 5.1 Activities and Deliverables

#### T-Scan Project Plan

##### End of Week2(5th January 2009)

Creating the UI in Liferay

Power user - Create Order

Power user - Add Requests

Admin will be able to create an order through the Add Provider admin function and provider is created Database.

A proof of concept where a link in Liferay portal which is tied to a document in Alfresco, is retrieved successfully thereby validating the full integration between Liferay and Alfresco.

Power user - Add Recipients

Power user - Request Summary

Admin will be able to modify/edit/update user information.

Search user functionality in the Admin Add Billing page will be available.

##### End of Week4-20th Jan 2009

Database Design

Power user - Order Summary

Database schema is delivered

Admin can use the Create Report menu to generate reports which in turn searches the tscan database and provides results

Power user - Records Received

Power user - Search Orders

Power user can now be able to create an order through the create order menu, bugs if any will be disclosed.

T-Scan portals UI framework with the menu getting displayed for a user based on the group that the user belongs to.

##### End of Week6-3<sup>rd</sup> Feb 2009

Power user - Records Processed

Alfresco content storage  
Alfresco webscripts

Creating the UI in Liferay

Power users would be able to search orders and filter the results, functionality in the power user home page will be available.

Alfresco schema delivered, customer is shown examples Admin will be able upload a template and Admin will be able to store values for separate database table.

User will be able to login in to the application. A sample user who is created in the database will be able to login through the liferay portal.



Power user - QC

Power user would now be able to record the Records Received information for an order.

#### End of Week8-17th Feb 2009

Login portlet

Creating the UI in Liferay

Admin will be able to add the Billing information for a user and the information database.

Admin - Reports

Search user/group functionality in the Admin Add Group page will be available.

UI Tab Menu Functionality

Search provider functionality in the Admin Add Provider page will be available.

Alfresco webscripts

Admin will be able to modify/edit/update user information.

Alfresco content retrieval

Admin will be able to modify/edit/update provider information.

AccordX integration

Alfresco content storage

Admin will be able to create an user through the Add User admin functionality and the user will be created in the Database.

Creating the UI in Liferay

Admin will be able to add the user to a group and set content level and portlet and the information will be stored in the database.

Client View - My Billing

When power user is creating an order, the required pdfs are generated on the specified intervals and gets stored in Alfresco known bugs if any

#### End of Week12-18th March 2009

PDF Generation Templates

Search template functionality in the Admin Edit Template page will be available

Order creation - PDF creation

Power user would now be able to record the Records Processed information for :

Power User - Invoices

Power user would now be able to record the QC information for an order.

#### End of Week15-10<sup>th</sup> April 2009

TScan - Home Page

Power user Home page "My Stats" functionality will be available.

TScan - Home Page

Power user Home page Current task functionality with filter will be available.

Client user will be able to create an order, and the order information will be posted to a Tscan specified email address

Background scripts to generate call taks for a Request.

Power user Records functionality

The Client will be able to view the groups they belong to.

Power user can now generate invoices for an order.



Client user will now be able to look at their billing list.  
TScan - Home page with the necessary portlets organized,  
also with the OOB liferay portlets and users once login  
will be taken to their home page with menus displayed  
based on permissions.

Tscan static html pages ported in to Liferay.





## **6.0 Assumptions**

### **6.1 Technical Assumption**

6. The software development platform is Alfresco Enterprise Release 2.9
7. External system integrations are not considered as part of the scope.
8. T-Scan will build the Production environment according to the specifications of BPA. BPA will provide direct support, as needed, to accomplish the production setup.

### **6.2 Resource Assumption**

1. BPA will assign a Key project contact that will be responsible for the project monitoring and reporting.
2. T-Scan professionals will be available to participate in the project as required for consultation, analysis, project meetings, clarifications, review and feedback.
3. T-Scan will provide workspace for the BPA staff working on site in T-Scan premises.
4. T-Scan will provide remote access to BPA from within T-Scan network to their development / testing & Production environment.
5. T-Scan will provide necessary resources and assistance in environment setup issues, such as database dump, code base, source control system, etc. and to keep the required systems running for the project activities.

### **6.3 General Assumptions**

9. The project will be executed on a continuous basis once started without any break in between. This includes go live activities.
10. T-Scan will be responsible for managing the involvement of any third party vendors / other T-Scan project teams, adhering to the project plan and time line.
11. T-Scan will provide requested information namely documents, data and any other relevant information required for successful project completion, based on the timelines defined in the detailed project plan developed during the planning phase of the project.
12. T-Scan will authorize, provide and facilitate access to necessary application, software, system, license and documentation. When needed T-Scan will conduct or facilitate knowledge transfer sessions to BPA team
13. T-Scan will provide for adequate hardware, software, software licenses and tools (infrastructure) to meet development, testing and deployment needs for this engagement.
14. T-Scan will provide feedback to BPA on deliverable documents in a timely fashion, not longer than three business days after receipts of the deliverable. If there is a delay the deliverables will be considered as accepted.
15. T-Scan will complete all assigned tasks according to the timelines defined in the detailed project plan.
16. T-Scan will perform the UAT itself with help from BPA in system level preparation for UAT and pre defined acceptance criteria furnished by T-Scan.



## 7.0 Project Price and Payment Terms

BPA estimates that this project will take 31 weeks elapsed time at an estimated cost of US \$111,600. BPA also expects to receive the payment of \$ 25,031 towards pending invoices with Tscan relating to previous project . BPA has a credit of \$10000 as mobilization advance. Hence the total price BPA expects to receive under this proposal stands at \$126,631( \$111600 + \$25,031- \$10,000).

### 1. Resource, Project Duration & Price

Resource Description	Estimated Work Hours	Hourly Billing rate
Alfresco Consultant (Harsha Rachapalli or equivalent)	600	\$90/hr
Portal Consultant (Sunder or equivalent)	640	\$90/hr
Project Advisor (Vijji Suryadevara or equivalent)	On a need Basis	No Charge

The price calculation assumes the participation of 2 BPA FTEs in USA. The price also factors in cost towards development hardware required by the BPA team and communication expenses. BPA will present invoices based on milestones as detailed below and expects to receive payment on receipt of invoice.

Milestone	Date	Amount in US\$
Milestone Invoice I- Start of Development(Includes the Payment of pending invoices)	22 <sup>nd</sup> Dec 2008	25,000
Milestone Invoice II- Completion of prototype of Portal	3 <sup>rd</sup> February, 2009	50,000
Milestone Invoice III- Development complete	10 <sup>th</sup> April, 2009	51,631

T-Scan and BPA will work together to assess project impact caused by significant scope changes and BPA will implement the scope changes once a mutual commercial and project schedule agreement is reached. Small scope changes will be absorbed by BPA or a scope tradeoff can be agreed to by both parties.

### 7.1 Project Expenses

The price described in section 8.0 does not include expenses towards travel, boarding and lodging of BPA personnel.

Such travel must be pre-approved by T-Scan and will be charged to T-Scan on an actual basis. No expenses will be incurred without prior approval from T-Scan. All travel by BPA personnel shall be consistent with T-Scan travel and expense guidelines



## Appendix A: Acceptance and Sign Off

By signing below, BPA Technologies (BPA) and T-Scan accept this proposal as a statement of work that will be executed by BPA. This proposal will supersede any prior project document or communication that may have been exchanged between BPA and T-Scan related to this implementation effort.

Once signed, any reproduction of this document made by reliable means (e.g., photocopy, facsimile or other scanned image) is considered an original.

<b>BPA Technologies, Inc.</b>	<b>T-Scan Corporation,</b>
Signed: _____	Signed: _____
Name: _____	Name: _____
Title: _____	Title: _____
Date: _____	Date: _____



## OFFICIAL ORDER FORM

July 24, 2008

T-Scan, on behalf of **[REDACTED]**, is requesting records from the following providers. Please indicate your preference for records on the appropriate line below, and return this form with the signed releases. If this official order form is not returned, you will not receive copies of records.

Re: **case name**Case No.: **case number**Patient: **patient name**If applicable, I want to be informed of any x-rays/films/MRI available. ☐ Y ☐ N☐ Y ☐ N provider name☐ Y ☐ N provider name☐ Y ☐ N provider name**PA Name****WSBA No. WSBA #****Date**

By signing this order form I understand and agree: 1) that I am responsible for all charges incurred in the production of records/copies/films I have ordered above; 2) that those fees include, but are not limited to a) a \$21.00 clerical fee per record produced, b) a \$0.45 per page copy fee; c) any shipping/messenger charges; d) any charges created by specialty requests/media variations in production of the documents, and; 3) that it is my responsibility to inform T-Scan in writing if I wish to cancel my request for records.



## HIPAA COMPLIANT AUTHORIZATION TO DISCLOSE HEALTH INFORMATION

Patient Name: \_\_\_\_\_

Health Record Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

1. I authorize the use or disclosure of the above named individual's health information as described below:
2. The following individual or organization is authorized to make the disclosure:

Provider  
Address 1  
Address 2

3. The type and amount of information to be used or disclosed is as follows:

- ☒ entire medical record for all dates  
☒ entire billing records for all dates  
☐ x-ray and imaging reports from (date) \_\_\_\_\_ to (date) \_\_\_\_\_  
 other \_\_\_\_\_

4. I understand that the information in my health record may include information relating to sexually transmitted disease, acquired immunodeficiency syndrome (AIDS), or human immunodeficiency virus (HIV). It may also include information about behavioral or mental health services, and treatment for alcohol and drug abuse.

This information may be disclosed to and used by the following individual or organization:

T-Scan Corporation, 4200 23<sup>rd</sup> Avenue West, Seattle, Washington 98199, ~~Office of Deborah A. Severson, 5515 South 23<sup>rd</sup> Street, Suite 210, Tacoma, Washington 98405~~ and representatives of ~~Safeco Insurance Companies~~ for the purpose of adjudicating person's law suit or claim.

5. I understand I have the right to revoke this authorization at any time. I understand if I revoke this authorization I must do so in writing and present my written revocation to the health information management department. I understand the revocation will not apply to information that has already been released in response to this authorization. I understand the revocation will not apply to my insurance company when the law provides my insurer with the right to contest a claim under my policy. Unless otherwise revoked, this authorization will expire on the following date, event or condition: \_\_\_\_\_ If I fail to specify an expiration date, event or condition, this authorization will expire ~~ninety days from date of signature~~ *at the end of litigation*.
6. I understand that authorizing the disclosure of this health information is voluntary. I can refuse to sign this authorization. I need not sign this form in order to assure treatment. I understand I may inspect or copy the information to be used or disclosed, as provided in CFR 164.524. I understand any disclosure of information carries with it the potential for an unauthorized re-disclosure and the information may not be protected by federal confidentiality rules. If I have questions about disclosure of my health information, I can contact (insert HIM director, privacy officer, or other office or individual's name or contact information).
7. I understand and agree that a copy or facsimile of my signature will be counted as valid as the original.

\_\_\_\_\_  
Signature of Patient or Legal Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
If Signed by Legal Representative, Relationship to Patient

\_\_\_\_\_  
Signature of attorney or witness





~~\_\_\_\_\_~~  
Account Specialist  
~~\_\_\_\_\_~~

July 24, 2008

Re: ~~\_\_\_\_\_~~

Case No.: ~~05-2-01-101-1~~

Dear Ms. St. Louis,

I am a representative of T-Scan, Inc. We are the record retrieval service for <sup>Law Firm</sup> ~~\_\_\_\_\_~~  
~~Officer, Deborah A. Stevenson, Managing Attorney~~. Enclosed please find an order form  
for the above referenced matter. Please indicate your preference for copies of the records  
and return it to T-Scan at your earliest convenience.

**Please note that if you do not return T-Scan's order form we will assume that you do  
not wish copies of the records. Return these to me at your earliest convenience.**

Thank you,

~~\_\_\_\_\_~~  
Rachel Battle  
Account Specialist  
T-Scan Corporation

Enclosures



~~Rachael Battle~~  
Account Specialist  
~~[Redacted]~~

July 24, 2008

**PA Information**

Re: ~~[Redacted]~~ Case Name  
Case No.: ~~[Redacted]~~ Case Number

Dear Mr/s. Plaintiff Last Name,

I am a representative of T-Scan, Inc. We are the record retrieval service for ~~[Redacted]~~ ~~Offices of Deborah A. Severson~~. Enclosed please find authorizations and the IRS Form 4506 to collect records of your client for their case involving Safeco. Please sign the authorizations, as well as sign and complete the highlighted areas of the IRS Form 4506. Please make sure that the appropriate **tax form number** is entered in **line 6 of the IRS form**. Also, please indicate on the order form whether you would like copies of the records.

**Please note that if you do not return T-Scan's order form we will assume that you do not wish copies of the records. Return these to us as soon as possible.**

Also, if there is any additional contact information, including first names, addresses, phone numbers, FAX numbers, etc. for any of the providers, please insert it in the space provided on the authorizations.

Thank you,

~~Rachael Battle~~  
Account Specialist  
T-Scan Corporation

Enclosures